View PEMS Roles and Permissions

1. Begin at the *Maintain Roles* screen (**Admin > Roles > Maintain Roles**).
2. Click the VIEW PERMISSIONS button to view the PEMS Administrator Roles permissions.

   Or

   Click the View Permissions link to view either the PEMS Core Roles or User Defined Roles permissions. The *View Role Permissions* screen displays based on your selection.
3. Click MAINTAIN ROLES to return to the *Maintain Roles* screen.

Announcements Sub Module

Send a New Announcement

1. Click Admin on the module menu bar . The *Maintain Users* screen displays.
2. Click Announcements on the sub-module menu bar. The *Create Announcements* screen displays.

Note: * *Indicates a mandatory field that must be completed.*

3. Click the checkbox next to the desired role(s) that will view the announcement.

Note: *The announcement is only viewable by the roles and agencies to which it is addressed.*

4. Complete the **Subject** and **Message** fields.
5. Click SEND ANNOUNCEMENT. A confirmation displays indicating the announcement has been created successfully.
6. Click Home. The *View Announcements* screen displays.
7. Click the announcement subject link in the **Subject** column of the **Message Search Result** section. The Message box displays the announcement details.
8. Click CLOSE WINDOW to close the message box.

PEMS Administration Module

Users Sub Module

Add a New User in Own Agency

1. Click Admin on the module menu bar. The *Maintain Users* screen displays.

Note: *Before you add a new user, you should check for users with the same first and last name to avoid a duplicate entry.*

2. Type the users first and last names in the **Search for Existing User(s)** section.
3. Click **Search**.
4. If the search results in 0 items found, continue with step 6.
5. If the search results in a duplicate entry found determine if it is indeed a duplicate. If it is, stop here. If it is not, continue with step 6.
6. Click **Add New User For My Agency** in the **Add User(s) & Admin(s)** section. The *Add User Details* screen displays.

Note: * *Indicates a mandatory field that must be completed.*

7. Type the users first and last names in the applicable fields.
8. Type a unique login ID in the **Login** field.
9. Type a password in the **Password** field.
10. Confirm the password.

Note: *See PEMS Help to view the Login ID and password guidelines.*

11. Choose **Yes** for **Enable Login**, if needed.

Enable Login: Yes No

12. If applicable, select the contract agency checkbox allowing the capability to enter data on behalf of the contact agency.
13. Select the **Do you want to assign Roles for this user?** option.

Do you want to assign Roles for this user? Yes No

14. Click SAVE AND CONTINUE.

    The *Assign Roles to User* screen displays indicating the new user has been added successfully.

Note: *If yes was selected in step 13 from above continue with **Assign a PEMS Role - Option 1**. If no was selected continue with **Assign PEMS Role - Option 2**.*

Assign a PEMS Role - Option 1

1. Beginning at the *Assign Roles to User* screen, select the applicable role checkboxes.
2. Click CONTINUE to access to *View User Aggregate Permissions* screen.

3. Click **SAVE AND FINISH**. The *Maintain Users* screen displays indicating the role has been assigned to the user successfully and that the user can now log in to the system.

Assign a PEMS Role - Option 2

1. Begin at *Maintain Users* screen **(Admin > Users > Maintain Users)**.
2. Click **Edit** in the **Roles** column for the user. The *Edit Roles for User Details* screen displays.
3. Select the applicable role check-boxes.
4. Follow steps 2 and 3 from Option 1.

View User Information

1. Begin at the *Maintain Users* screen **(Admin > Users > Maintain Users)**.
2. Search for the user, if needed.
3. Click the user's **Last Name** in the **Last Name** column in the **User Search Result** section to access the *View User Details* screen.
4. Click **BACK TO MAINTAIN** to return to the *Maintain Users* screen.

View a User's PEMS Roles and Aggregate Permissions

1. Begin at the *Maintain Users* screen **(Admin > Users > Maintain Users)**.
2. Search for the user, if needed.
3. Click **View** in the **Permissions** column in the **User Search Result** section to access the *View User Aggregate Permissions* screen.
4. Click **BACK TO MAINTAIN** to return to the *Maintain Users* screen.

Add a PEMS Administrator for a Contract Agency

1. Click **Admin** on the module menu bar. The *Maintain Users* screen displays.

Note: *Before you add an Administrator, you should check to determine if an Administrator has already been set up for the contract agency.*

2. Click the **Agency** drop-down list arrow in the **Search for Existing User(s)** section.

Agency:
Positive World Vision

3. If the contract agency is not in the drop-down list that indicates an Administrator has not been added, continue with the next step.

Note: *In the PEMS Administrator role the PEMS software allows you to add only one Administrator per contract agency.*

4. Click **Add New Admin for Contract Agency** in the **Add User(s) & Admin(s)** section to display the *Add Administrator Details* screen.

PEMS Administration Module

Note: ✱ *Indicates a mandatory field that must be completed.*

5. Click the **User Agency** drop-down list arrow and select the agency.

User Agency: Virginia Center for Social Acti

Note: *The only user agencies that will be available in the drop-down list are those that do not have an Administrator assigned.*

6. Type the users first and last names in the appropriate fields.
7. Type a unique login ID in the **Login** field.
8. Type a password in the **Password** field.

Note: *See PEMS Help to view the Login ID and password guidelines.*

9. Confirm the Password.
10. Choose **Yes** for **Enable Login**, if needed.

Enable Login: Yes No

11. Click **ADD**. The *Maintain Users* screen displays indicating the administrator has been created successfully and that the administrator can now log in to the system.

ROLES SUB MODULE

Add a New User Defined Role

1. Click **Admin** on the module menu bar. The *Maintain Users* screen displays.
2. Click **Roles** on the sub-module menu bar. The *Maintain Roles* screen displays.
3. Click **Add New User Defined Roles** in the **User Defined Roles** section. The *Add Role Details* screen displays.
4. Type a descriptive name in the **Role Name** field.
5. Click the **Use Template** drop-down arrow and select a core role to base the template from.

Use Template:

6. Click **ADD PERMISSIONS**. The *Add Permissions to Role* screen displays.
7. Select desired permissions.

Note: *Because the user defined role is based on a template, you must modify the permissions. To avoid creation of multiple roles with the same set of permissions, the system does not allow addition of roles which are similar to one of the existing roles (core or user defined).*

8. Click **SAVE AND FINISH**. The *Maintain Roles* screen displays indicating the user defined role has been created successfully.